This job aid provides step-by-step instructions for running and reviewing the Facilities QA Report, which captures common errors associated with square footage. There is a separate Lease Contract QA Report, which captures commons errors associated with the lease contract and associated tables. Agencies should run both reports to validate their data.

FPMT has updated roles and permissions, which determine which data and functionality a user can access. All users can access both QA reports; however, to correct errors users must have the following roles:

- Facilities QA Report errors: Must be corrected by a user with the Facilities role and edit rights.
- Lease Contract QA Report errors: Must be corrected by a user with the Accounting role and edit rights.

Contents

Overview

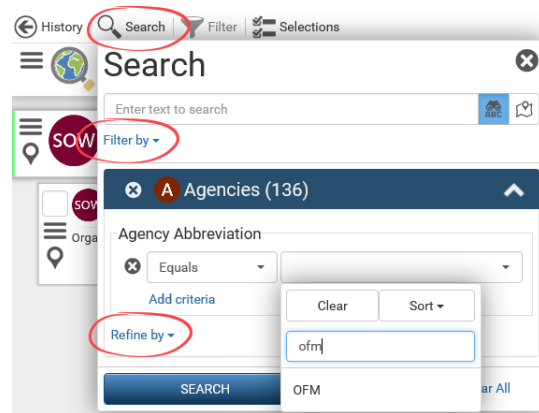|	
Which FPMT user roles can access the Facilities QA Report?	• All user roles, including read-only, can access the Facilities QA Report. • Users must have the Facilities user role and edit rights to correct any errors that appear in the Facilities QA Report.
Where do I access the Facilities QA Report?	• The Facilities QA Report is accessed from the agency tile. Select the menu button, reports, and Facilities QA Report. • The report will open in a separate window, and you will have the option of downloading the report in Excel or PDF format.
When should I run the Facilities QA Report?	• The Facilities QA Report can be reviewed at any time to check for errors. • Agencies are required to validate their data and correct any errors prior to submitting their annual inventory reports to OFM. • If you have entered new owned or leased facilities, wait to run the Facilities QA Report until after you have received notification that the new facilities have been approved by OFM.
How do I know if I have errors in the Facilities QA Report?	• The goal is to have a "clean" QA report, which will not have any content. All Excel tabs will be empty. • Errors are grouped in tabs by category. • Make sure to check each Excel tab to see if there are any errors.
What types of errors are included on the Facilities QA Report?	• The Facilities QA Report captures common types of errors related to square footage. • There is a separate Lease Contract QA Report that captures common errors related to the lease contract and associated tables. • Agencies should check both reports prior to submitting their annual inventory reports to OFM. • All user roles can access both QA reports. • Users must have the Accounting user role and edit rights to correct any errors in the Lease Contract QA Report.
How do I fix the errors listed on the Facilities QA Report?	• Refer to the Facilities QA Report – Corrections Steps job aid for instructions.
How do I know if the correction steps worked?	• Rerun the Facilities QA Report after making corrections. • If you have correctly followed the data validation instructions, the Facilities QA Report will be "clean."

Run the Facilities QA Report

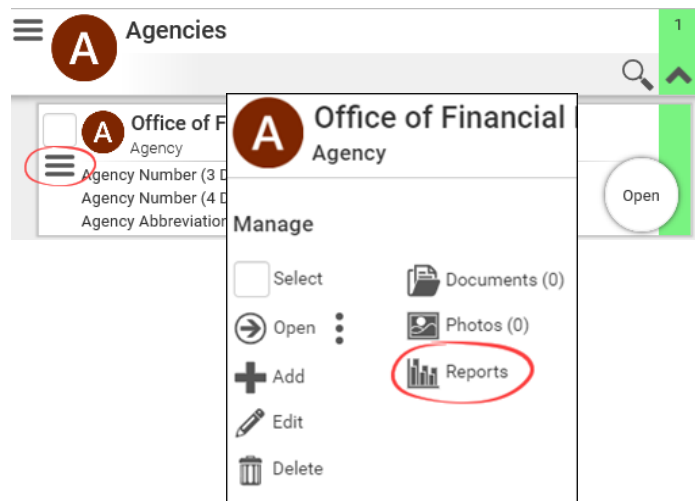Navigate to the agency tile and run the Facilities QA Report.

1. **Open** the Data Explorer module.

   Data Explorer
   Begin here to search, analyze, and drill down into your data
   Open
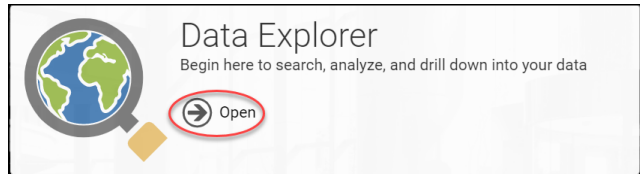
2. **Select** the 🔍 Search button on the data explorer tool bar.

3. **Select** Filter by ▾ and choose **Agencies**.

4. **Select** Refine by ▾ and choose **Agency Abbreviation**.

   ➔These are SAAM acronyms.

5. **Enter** the abbreviation.

   ➔You can type in the text box to filter the list.

6. **Select** SEARCH

   History Search Filter Selections

   Search

   Enter text to search

   Filter by ▾

   ⊗ A Agencies (136)

   Agency Abbreviation

   ⊗ Equals ▾

   Add criteria   Clear   Sort ▾

   Refine by ▾   ofm

   SEARCH   OFM   ar All

7. **Select** the ☰ menu button on the agency tile.

8. **Select** 📊 Reports

   ☰ A **Agencies**   1

   A Office of F
   Agency
   Agency Number (3 D
   Agency Number (4 D
   Agency Abbreviation

   A **Office of Financial**
   Agency

   Manage

   ☐ Select   📁 Documents (0)

   ➔ Open ⋮   🖼 Photos (0)

   ➕ Add   📊 Reports

   ✏ Edit

   🗑 Delete

   Open

9. **Select** Facilities QA Report.

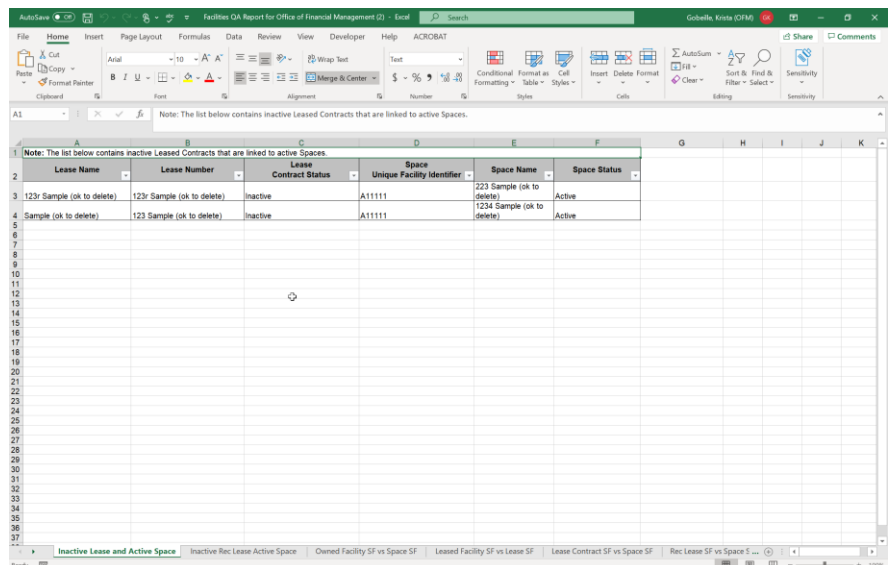   ➔The report will open in a new window.
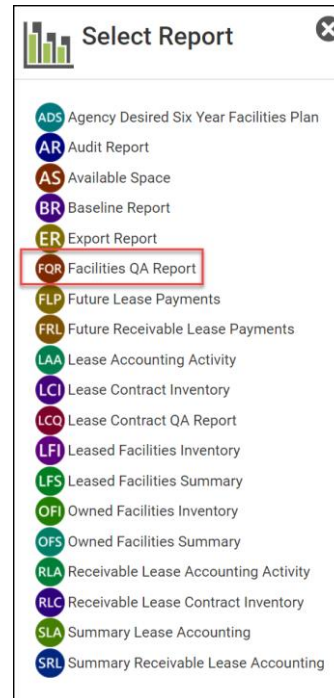
10. **Select** Download Excel Report

    ➔In Chrome, the Excel file will appear at the bottom left of your screen.

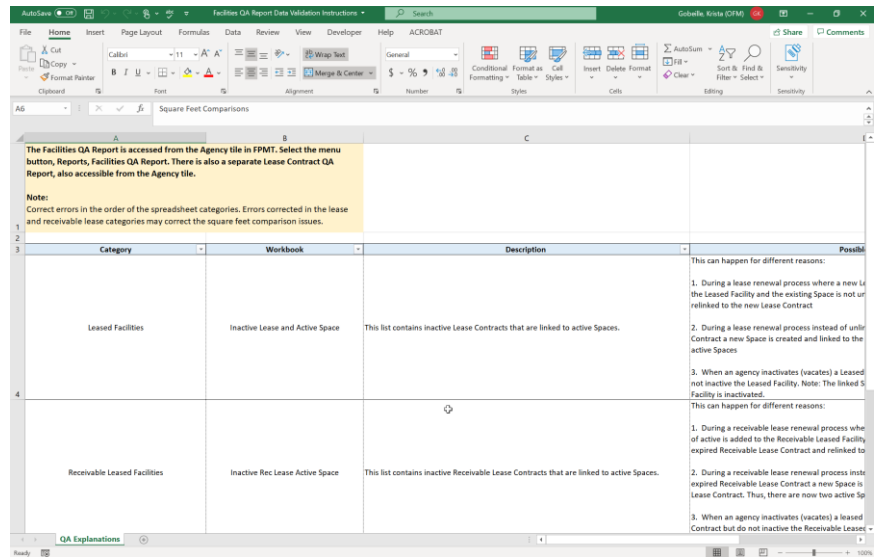## Correct Errors

1. **Review** all six tabs for errors.

2. If errors are present, follow the instructions in the [Facilities QA Report – Corrections Steps](#) job aid.

   ➔ In the Workbook column, you will find error types that correspond to each of the tab names in the Facilities QA Report, along with a description of the error, causes and correction steps.

3. **Rerun** the Facilities QA Report until it is "clean."